

DEVELOPING YOUR SUSTAINABILITY

| Revenue Goals | | |
|------------------------------|------------------|--------------------|
| Financial Resource Goal | Where I am today | Where I need to be |
| Annual revenue | | |
| Special project revenue | | |
| # donors | | |
| # volunteers raising revenue | | |
| Fundraising expense | | |
| Other | | |
| Other | | |

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FINANCIAL SWOT ANALYSIS

| SWOT Areas | Statements about your organization |
|---------------|------------------------------------|
| Strengths | |
| Weaknesses | |
| Opportunities | |
| Threats | |

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FIFTEEN REVENUE SOURCES

Note the appropriateness for each of the fifteen revenue sources for your organization.

| Type | Notes | Y or N? |
|--|-------|---------|
| Annual or sustained gifts | | |
| Major gifts | | |
| Planned gifts | | |
| Foundation grants | | |
| Cause-related marketing | | |
| Corporate giving program | | |
| Related earned income activities | | |
| Unrelated business income | | |
| In-kind | | |
| Supporting organization | | |
| Benefits | | |
| Federal, state, and local municipalities | | |
| Churches/denominations | | |
| Federated funds | | |
| Internet | | |

PROPOSAL CHECKLIST

| | | | | |
|---------------------------------------|--|-----------|-------------|--|
| Program Title: | | | | |
| Contact Name: | | | | |
| Phone/email: | | | | |
| TA Conference: | | | | |
| Due Date and Time: | | Received? | Postmarked? | |
| Mailing/Delivery Instructions: | | | | |

(Photocopy delivery address/instructions and staple to this checklist).

Format:

| | |
|----------------------|--|
| Page Limit: | |
| Margin Size | |
| Spacing | |
| Font Size | |
| Page #s | |
| Headers/Footers | |
| Number of copies: | |
| Required Signatures | |
| Special Instructions | |

Attachments required:

| | |
|----|-----|
| 1. | 7. |
| 2. | 8. |
| 3. | 9. |
| 4. | 10. |
| 5. | 11. |
| 6. | 12. |

100 FOUNDATIONS SUPPORTING FAITH-BASED & COMMUNITY ORGANIZATIONS

| Foundation | Total Annual Giving | Year |
|--|---------------------|------|
| The Ford Foundation | \$ 652,091,000 | 2000 |
| Lilly Endowment Inc. | \$ 583,890,521 | 2000 |
| The Robert Wood Johnson Foundation | \$ 270,985,040 | 2001 |
| The Pew Charitable Trusts | \$ 187,853,822 | 2000 |
| The Duke Endowment | \$ 106,030,389 | 2000 |
| Marin Community Foundation | \$ 50,524,713 | 2001 |
| J. Bulow Campbell Foundation | \$ 35,235,477 | 2000 |
| The Richard and Helen DeVos Foundation | \$ 33,614,934 | 2000 |
| F. M. Kirby Foundation, Inc. | \$ 28,783,521 | 2000 |
| Jay and Betty Van Andel Foundation | \$ 28,545,056 | 1999 |
| Meadows Foundation, Inc. | \$ 28,474,963 | 1999 |
| Pritzker Foundation | \$ 25,529,991 | 1999 |
| Mary Stuart Rogers Foundation | \$ 24,274,967 | 2000 |
| William Randolph Hearst Foundation | \$ 23,575,000 | 2000 |
| John Templeton Foundation | \$ 19,000,203 | 1999 |
| The Lincy Foundation | \$ 18,766,273 | 2000 |
| Bradley-Turner Foundation | \$ 18,551,514 | 2000 |
| Beatrice P. Delany Charitable Trust | \$ 18,000,000 | 2000 |
| Jessie Ball duPont Fund | \$ 16,315,024 | 2000 |

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| Foundation | Total Annual Giving | Year |
|---|---------------------|------|
| Orville D. & Ruth A. Merillat Foundation | \$ 15,606,948 | 2000 |
| Dan Murphy Foundation | \$ 14,116,709 | 1999 |
| The Winston-Salem Foundation | \$ 14,113,870 | 2000 |
| Connelly Foundation | \$ 14,008,662 | 2000 |
| The Hearst Foundation, Inc. | \$ 13,295,000 | 2000 |
| Aimee and Frank Batten, Jr. Foundation | \$ 13,225,685 | 2000 |
| Dr. Scholl Foundation | \$ 12,815,494 | 2000 |
| Booth Ferris Foundation | \$ 12,449,500 | 2000 |
| Helen Bader Foundation, Inc. | \$ 12,385,092 | 2000 |
| Garmar Foundation | \$ 11,894,351 | 2000 |
| The Capital Group Companies Charitable Foundation | \$ 11,076,765 | 2000 |
| E. Rhodes & Leona B. Carpenter Foundation | \$ 10,563,916 | 1999 |
| Florik Charitable Trust | \$ 10,299,474 | 2000 |
| Carrie Estelle Doheny Foundation | \$ 9,661,245 | 2000 |
| Wege Foundation | \$ 9,604,259 | 2000 |
| The Cannon Foundation, Inc. | \$ 9,250,163 | 2000 |
| The Assisi Foundation of Memphis, Inc. | \$ 9,214,148 | 2000 |
| The Cockrell Foundation | \$ 8,375,001 | 2000 |
| John R. McCune Charitable Trust | \$ 8,055,471 | 1999 |
| The Collins Foundation | \$ 7,996,859 | 2000 |
| William E. Simon Foundation, Inc. | \$ 7,695,238 | 1999 |
| Hedco Foundation | \$ 7,410,971 | 1999 |

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| Foundation | Total Annual Giving | Year |
|---|---------------------|------|
| Fritz B. Burns Foundation | \$ 7,342,500 | 2000 |
| The Ave Maria Foundation | \$ 7,240,893 | 1999 |
| Hamon Charitable Foundation | \$ 7,215,000 | 2000 |
| S. J. & Jessie E. Quinney Foundation | \$ 7,045,634 | 2000 |
| Kopp Family Foundation | \$ 7,031,550 | 2000 |
| English-Bonter-Mitchell Foundation | \$ 6,943,000 | 2000 |
| The Arcadia Foundation | \$ 6,922,731 | 2000 |
| The Nash Family Foundation, Inc. | \$ 6,907,496 | 2000 |
| Perot Foundation | \$ 6,886,195 | 2000 |
| Brickman Foundation | \$ 6,878,701 | 2000 |
| Baton Rouge Area Foundation | \$ 6,750,000 | 2000 |
| Raskob Foundation for Catholic Activities, Inc. | \$ 6,721,439 | 2000 |
| Lutheran Brotherhood Foundation | \$ 6,702,466 | 2000 |
| The Stewardship Foundation | \$ 6,608,701 | 1999 |
| Edgar and Elsa Prince Foundation | \$ 6,514,250 | 2000 |
| Reiman Charitable Foundation, Inc. | \$ 6,510,405 | 1999 |
| Callaway Foundation, Inc. | \$ 6,462,053 | 2000 |
| The Chatlos Foundation, Inc. | \$ 5,951,786 | 2000 |
| Mustard Seed Foundation, Inc. | \$ 5,701,494 | 1999 |
| The Community Foundation of South Alabama | \$ 5,500,207 | 2000 |
| Robertson Foundation | \$ 5,410,959 | 1999 |
| The Longleaf Foundation | \$ 5,316,750 | 2000 |
| Clark-Winchcole Foundation | \$ 5,165,300 | 1999 |

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| Foundation | Total Annual Giving | Year |
|---|---------------------|------|
| The Andreas Foundation | \$ 5,082,083 | 2000 |
| Rockwell Fund, Inc. | \$ 5,019,675 | 2000 |
| Wilf Family Foundation | \$ 4,634,146 | 2000 |
| Jon & Joanne Corzine Foundation | \$ 4,612,220 | 2000 |
| Dade Community Foundation, Inc. | \$ 4,575,028 | 1999 |
| Siebert Lutheran Foundation, Inc. | \$ 4,409,587 | 2000 |
| The Jay L. & Jean Schottenstein Foundation | \$ 4,384,584 | 1999 |
| Eva L. and Joseph M. Bruening Foundation | \$ 4,254,319 | 2000 |
| I. A. O'Shaughnessy Foundation, Inc. | \$ 4,234,500 | 2000 |
| Laffey-McHugh Foundation | \$ 4,213,956 | 1999 |
| The Elmer & Mamdouha Bobst Foundation, Inc. | \$ 4,209,530 | 2000 |
| William K. Bowes, Jr. Foundation | \$ 4,195,650 | 1999 |
| The Hyde and Watson Foundation | \$ 4,176,700 | 2000 |
| The Norcliffe Foundation | \$ 4,059,275 | 2000 |
| Stephen & Mary Birch Foundation, Inc. | \$ 3,989,250 | 1999 |
| Atherton Family Foundation | \$ 3,865,550 | 1999 |
| Lamar Bruni Vergara Trust | \$ 3,734,143 | 2000 |
| Wallis Foundation | \$ 3,702,800 | 2000 |
| The Altus One Fund, Inc. | \$ 3,699,100 | 1999 |
| William I. H. and Lula E. Pitts Foundation | \$ 3,588,925 | 2000 |
| Watkins Christian Foundation, Inc. | \$ 3,575,600 | 2000 |
| Bill & Berniece Grawcock Foundation | \$ 3,562,800 | 2000 |
| The Margaret L. Wendt Foundation | \$ 3,538,865 | 2000 |

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| Foundation | Total Annual Giving | Year |
|---|---------------------|------|
| Alan B. Slifka Foundation, Inc. | \$ 3,522,492 | 1999 |
| Homeland Foundation, Inc. | \$ 3,455,591 | 2000 |
| The George F. Baker Trust | \$ 3,312,595 | 1999 |
| George M. Eisenberg Foundation for Charities | \$ 3,209,000 | 2000 |
| The Dorothy Cate & Thomas F. Frist Foundation | \$ 3,186,139 | 1999 |
| The ALSAM Foundation | \$ 3,184,925 | 2000 |
| Strake Foundation | \$ 3,153,500 | 2000 |
| Hobby Family Foundation | \$ 3,137,719 | 1999 |
| Vinod Gupta Charitable Foundation | \$ 2,925,744 | 1999 |
| Rollins-Luetkemeyer Foundation, Inc. | \$ 2,893,550 | 1999 |
| The Gertrude C. Ford Foundation, Inc. | \$ 2,866,500 | 2000 |
| Perkins-Prothro Foundation | \$ 2,865,310 | 2000 |
| Y & H Soda Foundation | \$ 2,841,011 | 2000 |

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KEY GRANTWRITING TIPS

Cover Letter

- Direct to the appropriate individual
- Start with a story, compelling statistic or a thank-you statement
- Transition to your history and track record
- Reflect any previous discussion you've had with the program officer
- Ask for a specific amount
- Explain how your project furthers the funder's mission/interests
- Include contact information
- Invite the funder to visit your site
- Have your Board Chair and/or CEO sign the letter

Organizational History

- Tell a story, not a chronology of events.
- Include the date your organization was founded
- Tell who started the organization
- Tell why the organization was founded
- Explain key events

Program Section

Start with a statement summarizing your request that...

- Describes what you're applying for
- Is specific to your project
- Asks for the money!

Needs statement

- Describe the geographic area for your project
- Use compelling statistics to illustrate depth, breadth, growth and/or urgency of the issue
- Focus on issues your program will address
- Start with an anecdote/story that illustrates the issue
- Include research that connects the issue to your proposed solution and demonstrates your work in this area

Target population

- The “target population” is the general group your constituency will come from; the “constituency” is who you actually served last year
- Tell about numbers served and other important characteristics (e.g., organizations you've worked with, areas of focus, etc.)

Goals and objectives

- “Goals” express the change you plan to produce

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- “Objectives” explain how many clients/organizations will be served, over what period of time and with how much service. Also, how much change you expect to occur, what measurement you’ll use and by when the change will occur.

Activities

- Describe each program component for which you are seeking funding
- Include the duration of each activity component—be specific!
- Explain why each component was selected
- Cite research on best and promising practices or evidence the strategy works

Evaluation

- Describe the “outcomes” for the target population
- Explain how you will measure the outcomes and what tools you’ll use
- Describe the process/time frame for collecting information
- Describe the information you’ll collect along the way that will inform your outcomes (process measures)

Attachments

- Board of directors
- Anti-discrimination statement
- Key staff list
- Financials
 - Most recent fiscal year-end financial statements (audited is preferable)
 - Current agency budget
 - Program/project budget, if applicable
- Annual report
- IRS determination letter
- List of major contributors
- List of volunteer involvement and in-kind contributions

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Fifteen Major Gift Cultivation Activities

- Invite to cultivation event
- Invite to a bequest society event
- Invite to participate in prospect screenings
- Invite to non-fundraising social activities
- Invite to become a board member, advisory member, president's council member, etc.
- Solicit an article for newspaper or magazine
- Write a feature story about them
- Call on their birthday
- Send cards – birthday, holiday, special event, etc.
- Send thank you gift during holidays
- Take their gift receipt to them
- Ask to host an event at their home, club, etc.
- Invite to be a featured speaker at an event
- Present the list of naming opportunities
- Print names in the annual publications

Major Gifts Resources

Major Gift Field Tools

- Volunteers—board, major gifts committee, ad hoc
- Events—seminars, vision trips, tours, dinners
- Materials—case, video, donor reports, recognition, brochures, testimonies
- Paper stuff—prospect list, contact reports, gift table, file of information

Selected Reading on Major Gifts

- <http://www.instituteforgiving.org/>
- <http://www.philanthropy.iupui.edu/fundschool.htm>
- <http://nonprofit.about.com/cs/fundraising>
- <http://www.nsfre.org>
- www.csfre.org
- <http://www.ncnb.org>

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